

## Notes

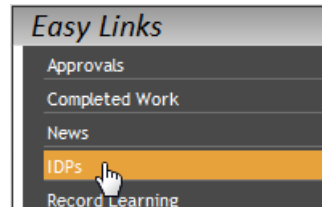
Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

# Changing a Calendar Year IDP to a Fiscal Year Plan

The actions taken to change a calendar year plan to a fiscal year plan depend on the status of the calendar year plan. If the plan is still in **Draft** status, you can simply change the plan period of the Draft plan, then submit it for approval. If the plan is in **Submit Pending** status, have your supervisor approve the plan, then follow the steps below. If your calendar plan is in **Active/Approved** status, you'll need to create your new fiscal year plan and then copy the goals from the calendar plan to the fiscal year plan. The steps below walk you through the procedure to accomplish this task.

## Step Activity View

- From your AgLearn Home Page, select the **IDPs** Easy Link.



- Click **Create New Plan**.



- Enter a title for your new plan.



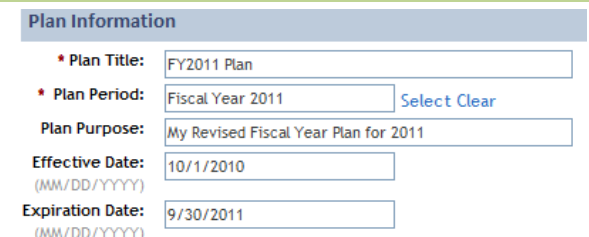
- Click **Select** to select a fiscal year period.



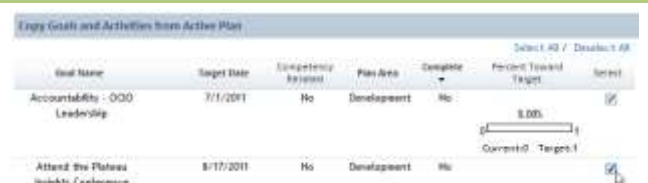
- Locate the fiscal year period you wish to select; then click the corresponding **Select** link.  
**Note:** You may need to click the **Next** link to view additional pages.



- If you wish, enter a **Plan Purpose**, then observe that the Effective Date and Expiration Date have been filled in for you and now reflect the fiscal year period.



- In the **Copy Goals and Activities from Active Plan** section, check the corresponding boxes of the goals you wish to copy to your fiscal year plan.

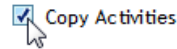


Plan Purpose is not a required field, but you may wish to use it to indicate that this is a revised plan, changing the Plan Period to a fiscal year.

Notes

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8. Check **Copy Activities** to include all goal related activities.

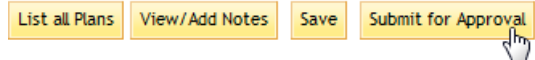


9. Click **Add**.



10. Click **Submit for Approval** to send the new plan to your supervisor.

**This plan contains changes that have not been approved.**



11. Wait for the confirmation message to appear, and then click the **List all Plans** button.



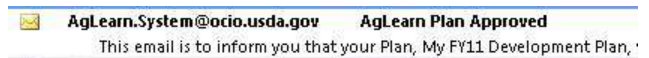
12. Observe that your Calendar IDP is still in Active/Approved status. Your FY2011 Plan is in Submit/Pending status awaiting your supervisor's approval.

Plan Title	Plan Period	Plan Status	Effective Date	Expiration Date	Action
Calendar Year 2011	Calendar Year 2011	Active/Approved	1/1/2011 12:00 AM	12/31/2011 11:59 AM	View Plan
FY2011 Plan	Fiscal Year 2011	Submit/Pending	10/1/2010 12:00 AM	9/30/2011 11:59 AM	View Plan

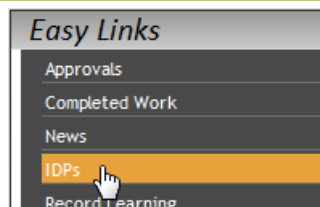
Immediately after submitting your plan you will see a CC of an email sent to your supervisor. Do nothing until you see a second email indicating your plan has been approved.

13. Check your email for a message from [AgLearn.System@ocio.usda.gov](mailto:AgLearn.System@ocio.usda.gov) with the title **AgLearn Plan Approved**.

**Note:** Make sure the title indicates that your AgLearn Plan has been approved.



14. Log in to AgLearn again and click the IDPs Easy Link.



15. Observe that your fiscal year plan is in Active/Approved status and your calendar plan is now in Superseded status, meaning it is no longer active. You can now add additional goals to your fiscal year plan as well as related activities.

Plan Title	Plan Period	Plan Status	Effective Date	Expiration Date	Action
FY2011 Plan	Fiscal Year 2011	Active/Approved	10/1/2010 12:00 AM	9/30/2011 11:59 AM	View Plan
Calendar Year 2011	Calendar Year 2011	Superseded	1/1/2011 12:00 AM	12/31/2011 11:59 AM	View Plan